



YOUR FIRST 90 DAYS WITH HEARTFELT CFO

FINANCIAL CLARITY, STRUCTURE, AND
SUPPORT — WITHOUT OVERWHELM.



WHO WE ARE

Heartfelt CFO helps business owners move from financial chaos to clarity and stability.

We believe:

- Financial clarity creates freedom.
- Strategy creates stability.
- Understanding your money changes everything.



WHAT WE DO

We combine bookkeeping, tax planning, and CFO-level guidance into one supportive, proactive system.

What that means:

- No surprises
- No last-minute stress
- A financial partner who leads with you

WHERE YOU'RE AT (NORMALIZATION)

Most clients come to us feeling overwhelmed, behind, or unsure where to start.

You might be:

- Behind on filings
- Unsure about what you owe
- Feeling ashamed or avoidant
- Running your business without financial clarity
- Hoping “things will sort themselves out”

WHERE YOU CAN GO (THE TRANSFORMATION)

Within 90 days, you can move from overwhelm → clarity and confidence.

You can have:

- Simple habits that prevent tax mistakes
- A system running in the background
- Predictable monthly rhythms
- Clear deductions and opportunities
- Relief from financial chaos
- Clarity instead of fear

WHAT YOUR FIRST 90 DAYS FEEL LIKE

Supported. Safe. Clear. Structured.



The experience of working with us:

- You feel held, not judged
- You finally understand what's happening financially
- You stop operating in crisis mode
- You gain stability, direction, and calm

STEP I: ONBOARDING & GROUNDING

We gather everything — you don't need to organize it first.

In this phase, we:

- Collect the documents we need
- Stabilize and clean your books
- Identify immediate risks
- Set up your financial foundation

STEP 2: CLARITY PHASE

This is where everything starts making sense.

You get:

- A clear picture of your numbers
- Missed deductions and opportunities
- Simple habits and rhythms
- Your “Financial Starting Line”

STEP 3: PROACTIVE LEADERSHIP

Your finances stop running you. We run them with you.

This includes:

- Monthly bookkeeping
- Ongoing tax planning
- Predictable systems
- Monthly clarity and reviews
- Zero year-end panic

WHAT WE TAKE OFF YOUR PLATE

You don't have to figure this out alone anymore.

We handle:

- Tracking every dollar
- Categorizing expenses
- Capturing deductions
- Avoiding missed opportunities
- Filing timelines
- Ongoing strategy

WHAT WE NEED FROM YOU

All we need is your openness and readiness.

You bring:

- Transparency
- Responsiveness
- A willingness to follow a plan
- A desire for change
- Honesty with where you're at

WHAT MOST CLIENTS EXPERIENCE BY DAY 90

“I finally
feel calm.”

“I’m not
afraid to
look at my
numbers
anymore.”

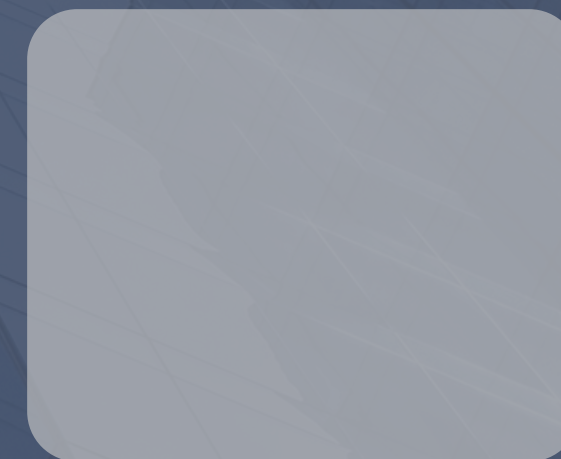
“I understand
what’s
happening.”

“I feel
supported,
not
judged.”

“This is the
first time
I’ve had
financial
stability.”

WHAT'S NEXT FOR YOU?

Ready to feel financially grounded?
Explore Packages or Book a Meeting



SCHEDULE YOUR SESSION TODAY

Book a Discovery Call with Margo at:
mmcfosolutions.com/discovery-call

or scan this QR code:





FROM HEARTFELT,

THANK YOU